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ABSTRACT

The continuing education of library staff is the focus of this collection of papers and journal articles presented at or related to seminars sponsored by the New York Metropolitan Reference and Research Library Agency (METRO). It includes "LEX: Law Advice for Public and Academic Librarians," by Alice Norton: the Library Journal/School Library Journal's 1977 special report on closing the card catalog: "Bibliography of Recent Journal Articles and Monographs on the Current Status and Future of Library Catalogs," compiled by James D. Anderson: American Libraries' May 1978 report on the Management Review and Analysis Program (MRAP): "Readings on MRAP and Related Management Studies," compiled by Augurio Collantes: "MED-INFO: For the Reference Librarian Who is Not a Medical Librarian," by Alice Norton: and "The Supervisor and the Troubled/Troublesome Employee," by Roger Parent. (FM)

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QUINTET: METRO SEMINAR REPORTS

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
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METRO

BECAUSE INFORMATION IS POWER

100 libraries and library systems in the New York City area work together through METRO

- to make the best and widest use of books, periodicals, microforms, and staff

- to expand these resources cooperatively

Education After Library School

Continuing education for library staff is one of the most effective ways the New York Metropolitan Reference and Research Library Agency pursues its two basic goals. These goals are: to make the best possible use of present library resources and to expand these resources cooperatively.

Each year METRO's seminars, workshops, and other educational programs attract thousands of library staff. Many others would like to participate but are prevented from attending because of distance or work schedules. To carry the content of five seminars to those who could not attend, METRO produced this publication.

METRO's seminars, such as those featured in this publication, represent only one facet of the agency's continuing education program. Other vital activities are: information exchange meetings led by one person; special interest discussion groups which begin with a presentation by one or two authorities and continue with questions and answers and general discussion; workshops at which staff learn techniques and skills; and symposia and lectures, sometimes in a series, at which national authorities speak.

The ideas and energy for METRO's continuing education activities come from volunteers who are on the staffs of member libraries. A task force plans and leads each program with assistance from the METRO staff.

Regional and national library journals and newsletters publicize the seminars and workshops and report on the programs. (This publication includes several of these reports.) METRO values this help in multiplying the benefits of its programs.

--Forrest F. Carhart, Jr.
Executive Director

Today *all* librarians are to some extent law librarians. Regardless of our subject specialties, we must expect to handle law materials and to receive legal questions which each year increase in complexity. Because our traditional professional training did not prepare us to fill this need, the seminar offers basic subject retraining.

What must we as librarians know about law? We must be able to fill new demands for legal information which arise from such diverse stimuli as government contracts and grants, television programs, and the sprawling growth of government regulation and administrative law. We must also locate and supply materials for students. Their awareness of the sociological implications of law increases as they find more legal citations in such general abstracts and indexes as *Sociological Abstracts* and Public Affairs Information Service (PAIS).

This seminar cannot in one day transform a reference librarian into a law librarian. It can, however, enable all librarians to increase their competence in a field of expanding importance.

LIBRARY JOURNAL

CONFERENCE REPORT

LEX: law advice for public & academic librarians

by Alice Norton
Head, Alice Norton Public Relations, Ridgefield, Conn.

For some of the 210 librarians who attended a recent seminar in New York City on federal legal materials and services, it was like a return to library school. The greeter at the door of the Fordham University building at Lincoln Center was Eugene P. Sheehy, editor of the indispensable *Guide to Reference Books* (still called "Winchell" by many of the participants). The seminar packet with its annotated 20-page bibliography of legal resources was reminiscent of a tough reference course. And the three speakers (each with both a library degree and a law degree) gave fact-filled lectures.

Sponsored by METRO (the New York Metropolitan Reference and Research Library Agency), the seminar was billed as LEX: Legal Materials for the Reference Librarian Who is Not a Law Librarian. Robert Sheehan (Mid-Manhattan Library, The New York Public Library), chairman of the LEX planning committee, described the seminar's purpose, in a promotional pamphlet. "Today *all* librarians," wrote Sheehan, "are to some extent law librarians." Among the causes for the growing demands for legal information he named "such diverse stimuli as government contracts and grants, television programs, and the sprawling growth of government regulation and administrative law." Students, too, are increasing their requests for law materials as they find more legal citations in general indexes. METRO promised participants they would receive instruction in the use of the "basic legal resources which are needed to find both the word of the law and its interpretation."

LEX Chairperson Josephine McSweeney (Pratt Institute Library) introduced the morning speaker, Janet Tracy, assistant professor of law, New York Law School. Tracy's background includes an M.L.S. from the University of Washington, and a law degree from Harvard, as well as work experience as a reference librarian, a law librarian, a practicing lawyer, and the designer of an automated legal information retrieval system. Her talk on Judicial Resources included sections from five of her law school lectures. She provided such basic legal definitions as: statutory law offers "general rules for society" which are passed by legislative bodies; case law is based on decisions of officials for which "you must have a controversy"; and a "holding" combines law and opinion relating to one case.

Tracy then gave an overview of the court system and offered practical advice on the use of judicial sources (both official and unofficial) and legal reference tools. The most basic, she said, are two massive encyclopedias which offer complete statements of American law (*American Jurisprudence* and *Corpus Juris Secundum*). But, she cautioned, "each entry is only as good as the citations at the end."

A basic resource, explained Tracy, is the *Shepard's Citations* series, which lawyers use to determine and evaluate the current authority of primary legal sources. Separate volumes are published for each state as well as for federal laws.

Tracy supplied photocopies of

pages from reference sources and guided participants through a case which involved a ringside spectator who was injured at a wrestling match.

For the non-lawyer, she said that the best way to use the *United States Supreme Court Digest* (covers every decision, and is valuable to history and sociology students) is to use the descriptive word index put out by the West Publishing Company. West is the major private publisher in the legal field, and supplies materials in print, on microform, and through computer data banks.

Throughout her talk Tracy warned against pitfalls (example: a digest of a case can be useful, but may have errors; it is essential to read the full text). The question period which followed the 1½ hour lecture showed that the public and academic librarians in the audience had already received many requests for legal materials and information. Some questioners asked how to use specific reference books. Others wanted to know the implications of giving legal advice. To the question, "Are there any problems when a librarian answers legal questions?," Tracy responded: "Don't give legal advice: that could be dangerous. Just point them toward the tools."

A spirited discussion among members of the audience and two of the seminar speakers focused on the problems created when library users are confronted with citations to sources that are not available to the public. Tracy commented that the libraries at bar associations, law firms, and law schools are all closed to the general public. Another seminar speaker, Dusan J. Djonovich, professor of law and law librarian at Brooklyn Law School Library urged the audience to fill this gap. Said Djonovich, "I am appealing to you through your sources to establish a full-fledged law library in one of New York's public libraries." One librarian in the audience had this immediate reaction: "I'm glad I came today. I learned that prisoners have a right to access to law libraries. This is something the average person doesn't have."

The first afternoon speaker was Edward J. Bander, associate law librarian, New York University School of Law. He opened his talk on Legislative Resources with a comment on the need for legal materials for laymen. "You public librarians," said Bander, "could do something about establishing a public library where persons could do legal research."

Among the helpful tips he offered: "You have a right to use closed law collections if the material is in a depository library." The Fordham libraries, he said, accept METRO's courtesy cards. Staff of METRO libraries can issue a card to an information seeker for one-time use of specific materials in another METRO library that otherwise might be closed to him or her. Before issuing a card the librarian phones the staff of the other library to get permission for the visitor to come.

Legislative history, Bander told the audience, is "the controversial area." He said that corporate lawyers facing tax problems hire an "army of law school students" to seek examples of former cases that are related to the one their corporation faces. When starting a legislative history search, he advised, one should first find out if such a search has already been made. Many law firms search statutes and some law groups index these searches. Bander methodically went through the seminar bibliography making comments on the purpose and usefulness of many materials.

Bander described the methods his library uses to arrange and shelve committee reports and hearings but added, "There is no convenient way until the government changes the publications." If you have not received materials ordered from the Government Printing Office within three months, he advised, send a query to the committee that issued the report or to your senator or congressman. The reason: the GPO keeps no back orders.

The topic for the final speaker, Dusan J. Djonovich (law degree from the University of Belgrade, M.L.S. from Columbia), was Executive Resources. Djonovich focused on the historical background in executive agencies, which eventually took responsibility for the production and dissemination of certain information. As for getting such information, Djonovich suggested that librarians first seek information in official government sources, then in privately published loose-leaf and bound services. Annual reports of administrative agencies, he said, are useful sources for proposed regulations and future policies and sometimes have historical information. But the use of indexes can present problems, Djonovich stated and added, wryly, "Some are

understood only by God and their creators."

The afternoon ended with an optional tour either of Fordham University's law library or of its general undergraduate library and several graduate collections. Those who chose the law library barraged the staff member-guides with questions about use of many of the reference materials they saw on the shelves during the tour.

Informal conversations among participants during the tours showed that the seminar was useful in a variety of ways. A cataloger in a college library said the seminar would help her catalog law materials ("difficult to do," she said). A public librarian said the seminar would help her with the growing numbers of users who seek information relating to their personal problems. ("One woman wanted to know the laws relating to abandoned children.") And the director of a women's college library said the increasing demand for legal materials stemmed both from undergraduate students who hope to enter law school and from students enrolled in women's studies programs. She noted, "We're creating a mini-law library within our reference area."

As one indication of the trend toward more legal education for librarians, Eugene Sheehy named the Columbia University School of Library Service's course in legal bibliography. "When I was in library school in Minnesota," said Sheehy, "we had nothing like this."

The LEX seminar was one of more than 40 seminars and workshops METRO has sponsored in the last six years for the continuing education of staff of its 90 member libraries and of other libraries in the region. The seminars have become a model for other library consortia.

Asked to name the factors which made the "LEX" seminar successful, Forrest F. Carhart, Jr., METRO's executive director, named these: a commitment to continuing education for library staff; an effective, hard-working volunteer committee, with efficient support from METRO's small staff; a minimum of six months time for planning and preparation; an accurate assessment of the needs and interests of potential participants; and the selection of top-notch speakers and discussion leaders.

Also: a central location with adequate transportation and appropriate facilities; a professionally prepared brochure with wide distribution; publicity through word of mouth and the library press; and a reasonable price. All METRO seminars and workshops are self-supporting. The cost is about $15 for staff from sponsoring agencies and $20 for others. Sale of extra copies of bibliographies supplies some income.

He noted that every seminar participant gets a packet containing the program, a list of nearby restaurants, name badges both for the morning and afternoon sessions, a pamphlet on METRO services, and (whenever possible) a bibliography of materials and resources prepared for the seminar.

METRO will supply copies of the 20-page, annotated LEX bibliography, as long as the limited supply lasts, for $5 each if a check or money order accompanies the order or $10 each if an invoice is required. Send orders to: METRO, 11 West 40th St., New York, N.Y. 10018. ■

The LEX bibliography described in the article is temporarily out of print. METRO will distribute an updated bibliography (price not yet known). METRO will send anyone who requests it an announcement on the new list and information on how to order copies.

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LJ SLJ

Late breaking news from the offices of Library Journal/School Library Journal

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Special Report: Closing the Catalog

CLOSING THE CATALOG: Over 200 concerned library planners from all over the country spent an intensive day in New York on November 4 as guests of METRO, the reference cooperative based in NYC. The topic that drew them all--and filled all places weeks before the event--was "Closing the Catalog." Among the people we spoke to before things started was Bob Clark, Director of the Oklahoma Department of Libraries. He had made the three-hour flight in hopes of getting an up to date reading on the subject of catalog closing. His department, the state library agency, he explained, is hoping to start a state network in Oklahoma, basing it initially on the major public libraries and the state library. University libraries are not taking the lead in this, he said; all over the state they are suffering from budgetary malnutrition. He pointed to the recent protest resignation of James Zink, Director of the University of Oklahoma library. Clark and some 200 other attendees got a rich diet of information and opinion from a team composed of Joseph Rosenthal (University of California, Berkeley); John Knapp (Research Libraries Group--Harvard, Yale, Columbia & NYPL); and Carol Weiss (University of Toronto). Rosenthal preached the necessary demise of the card catalog and its replacement by online technology. Knapp provided a guided tour of the unfamiliar country ahead, with the library's card catalog in any one of several states of embalmment; and Carol Weiss gave a fine, anecdotal account of the often surprising experience of the staff at the University of Toronto, which has already gone quite a way into terra incognita. After they got through, several discussion groups provided opportunities to ask questions and probe alternatives. METRO fielded a strong additional team to chair these sessions, keeping them small enough to be effective. And there will be a second chance, if the report below makes you wish you'd been there: Forrest Carhart, METRO Director, says that there will be a re-run to take care of the many people who had to be turned away. It will be held in February, on a date to be announced.

ROSENTHAL: THE CARD CATALOG MUST GO: U.Cal-Berkeley's Joe Rosenthal led off with a meaty paper that will be worth study when it is published. Here is a brief guide to it: Segmenting: This is a better way to think about it than "closing", he suggested, because we're talking about a passing phase; in the future the entire library bibliographic record will be re-integrated. The number of libraries which already are close to having all their bibliographic data--old and new--in machine readable form is growing. Strategy Question: a decision that must be made: do it now, or wait until anticipated progress makes available higher quality files than are now available to make the changeover.

Determinants: Among the factors to be considered in making such a decision: the rate of growth being experienced, the volatility of the catalog (amount of ongoing change--additions, changes, deletions from the record); and the nature of the collections. It's a lot easier if the collection is limited to one--or maybe two--languages, and consists only of books and serials, than to work with a highly heterogeneous collection.

Policy on Provision of Access Points: The number of entries involved in the production of a single author (Joe Zilch's autobiography, self published, never reprinted and probably never read) being at one end of the scale--and Shakespeare, 7

with hundreds of editions, hundreds of commentaries at the other. Corporate authors too, with multiple links to books, agencies, organizations, also multiply the problem of providing access points. Some 3/4 of the corporate authors listed by the Library of Congress have associated references, while only ¼ of the personal authors do. Serials, in comparison with monographs, exist in a relatively limited number of titles, but they generate immense amounts of bibliographic work and a great many, in addition, have corporate authors. Then there are place names for political entities. These may be limited in number, but they change at a very fast clip, especially in recent years. Topical Subject Headings: The number possible is unlimited and could reach astronomical proportions if they were not controlled by the compilers of thesauri of subject headings. Also: subject headings are generally chosen for a work as a whole; there is usually only one heading for a given title; and the subject cataloger must struggle to match a rapidly changing subject matter with the slowly changing list of terms available for describing it. Without the option of assigning many terms to each document, the cataloger must choose among alternatives --and for this reason we cannot expect too much of the subject side of the catalog of a large collection. For this we must look elsewhere.

More Changes Foreseen: There is the problem of reconciling and distinguishing among terms used to convey different meanings in different disciplines: consider in Chemistry, Mathematics, and Psychology the different referents of "value," or "analysis." A worsening problem is the increased rapidity of changes being made in rules and guidelines for cataloging. There were 35 years between the dicta of Panizzi and Cutter, but only 12 between the first and second editions of the *Anglo-American Cataloging Rules*--and in the meantime two major chapters have already been revised and issued separately. This bodes well for the employment of catalogers, Rosenthal noted, but it involves them in a foredoomed effort to maintain consistency in the bibliographic record. And cataloging rule changes tend to affect those headings most likely to generate problems: corporate authors rather than personal authors; ambiguous, obsolete, or repugnant terms rather than those with clear referents. Revisions, he noted, often stem from attempts to resolve impossible complexities. And revised rules often reduce the cataloger's ability to reflect the makeup of the collections: it may not, for example, be possible to make all the changes called for by a rule revision. In the meantime, catalogers must learn new rules--without forgetting the old ones--not for original cataloging alone, but for copy cataloging too. Reference librarians and even filing clerks are similarly constrained, although there is no way to stem the gradual loss of the knowledge of old cataloging rules.

Cost Factors: Any estimate of the costs of maintaining a card catalog must take into consideration the coming change in LC cataloging policy; LC will close its catalog in 1980. But among the costs now reported for one card catalog: Overtyping headings: $10,000/year. Card production: $15,000/year. Filing: $123,000/year. Catalog Maintenance: $31,000/year; and one unexpected tariff: the cost of travel by academic searchers and monographic catalogers to and from the card catalog: $27,500/year. If card filing is to continue, new cabinets will cost another $15,000/year and the card stock alone will run to $16,000/year. All of these, Rosenthal said, could be tentatively considered as savings if they were discontinued, even without factoring in the almost surely rising costs of both personnel and equipment.

Growth Is Basic: The growth in size and in complexity of collections is basic, said Rosenthal, for large heterogenous collections. But the problems resultant will concern all libraries that rely on LC cataloging. The years of prodding the Library of Congress to speed up its dinosaur pace of change have accomplished their end, and now the chickens are coming home to roost. LC won't change repugnant subject headings until it closes the catalog in 1980. But then lots of changes are to be expected. If large research library acquisitions continue at the present pace, personal names will increase at the same steady rate now seen. But duplication among these names is bound to increase, since relatively few names are used by ever larger numbers of authors. There will be an increase in names from ◊

Growth Is Basic, (Cont'd): other languages (such as Arabic). Corporate authors will increase. Serials will not reduce in numbers. And the future of subject analysis and LC's role in it is speculative, and likely to be influenced by policy decisions, the existence of new databases, and other factors. The upshot of all this, Rosenthal predicted, will increase the demand for cataloging resources and decrease the efficiency of cataloging; attempts to counter these trends will lead to diminishing returns. "Bibliographic change and how to cope with it is our subject here--not the closing of the card catalog," he urged. The many factors noted above make a powerful case for our getting out of the card catalog business. Card catalogs are monkeys on our backs. But regardless of the form of bibliographic display we choose, the work of differentiating among bibliographic items will have to go on. The attempt to continue it with the card catalog would be "wasteful, stultifying, and unconscionably expensive to maintain." And it can result in keeping readers away from books as well as keeping us from using our resources to increase the quality of bibliographic access, he concluded.

RLG'S KNAPP CHARTS TASKS & OPTIONS FOR CATALOG CLOSING: John Knapp, Vice President for Systems at the Research Libraries Group (Harvard, Yale, Columbia, NYPL) followed Rosenthal with a useful mapping out of factors to consider. He began by noting that the shift to an automated catalog involves a basic change in the concept of the end produce of cataloging: instead of a tangible card, the product is an intangible electronic entity existing in a machine-readable store. The possibility of regular renewal and maintenance is the main value to be sought in the machine readable catalog, and this involves a shift of focus on the part of the cataloger.

Authority Files and Authority Control: Any system chosen, he warned, should provide for a "syndetic structure" that will allow for conjunction between a bibliographic file and an authority file, so that at the time of cataloging production two sets of data are merged. The authority file, which is created externally to the other file, exerts continuing bibliographic control over it. This control breaks down into the following functions: Verification of headings; conversion of fold headings to new ones; heading maintenance for the entire file (enabling one transaction to change all relevant headings in the file); provision of cross references; and substitution of better headings. The latter, he noted, is something he supports, but which has not yet gained general acceptance. It would allow the use of a form of heading different from that used by LC--and also the changing of offensive LC headings to suit local requirements and tastes--even though LC can't afford to change these offensive headings in its own catalog. It should be possible to do this, said Knapp, without losing the ability to use LC data in an economic way.

Savings Seen Small: Knapp suggested that a cost analysis of most libraries would show that the cost of the card catalog per se would represent only about 18% of the total cost of the cataloging operation. Assuming that a new form of catalog could save half the cost of the card catalog, this would only provide a 9% overall savings. Library administrators, he warned, should not seek the salvation of their budgets through replacing the card catalog. He noted also that the relatively small amount of present budget devoted to "catalog maintenance" is not a reflection of what needs doing, but of the limited amount that it has been possible to do. Automation, on the other hand, can do a great deal more, but although this will represent an improvement in product, it will not save money.

Distributing the Costs: The real success of OCLC, he noted, can be attributed to addressing itself to this central factor. Cataloging must still be done, regardless of the final form it takes, and in the future the work must be done within a shared system using online technology; even the largest libraries will no longer be self sufficient. OCLC's focus on this prime necessity, despite the

Distributing the Costs, Cont'd: system's many shortcomings (it can't be used as an alternative for a card catalog) is its strongest claim to leadership in bibliographic networking.

To Close or Convert: One decision which must be made is whether to attack the conversion of all records held or to close the present catalog and start the new one with new acquisitions. Complete conversion, Knapp argued, can be very practical for small libraries (holdings of 100,000 or less), since most of their holdings are duplicated in existing databases and the records may be obtained for a modest fee. A sampling of the shelflist--which is mandatory anyway--will provide an estimate. In any case, conversion, regardless of the availability of machine readable records, will demand a great editing effort. He is against the "crash job" approach, he said, urging that a better job will be done if it is spread over two to three years. And one should investigate the commercial services which are offered.

To Close the Catalog: If conversion is not possible, the decision must be made whether to close the catalog by the date of publication of a new acquisition or by the date of its imprint. If the latter, all imprints after a certain date go into the new catalog. This is easy to explain to users, but it has disadvantages too: it means that continuous maintenance of two catalogs will proceed for an indefinite time and actual freezing of the old one becomes remote. If one closes by date of cataloging, however, all current cataloging will be done using a single set of rules and procedures. This can lead to a winding down of the old catalog, and to its eventual freezing.

Links Between the Catalogs: Another decision area concerns the links which will be provided and maintained between the two catalogs. This will depend to some extent on the amount of money that can be devoted to such things as assuring that if the new catalog says of "California, University" that one should consult "University of California," the old catalog will have the obverse. A possibly dubious alternative which has been proposed: no links, but rely on internal see/see also references as sufficiently suggestive to guide the user. Finally, the provision of links must be taken into account as a possible source of a short-term cost increase caused by catalog closing. Additional problems will come along with serials and multi-volume monographs. In view of all these, the question should again be posed: are you sure you want to close the catalog?

Potential Formats/Alternatives to the Card Catalog: These include the printed catalog, microform, and the online catalog. Costs will dictate the frequency of updating or republishing. But a cumulating supplement is the least you should settle for, advised Knapp; this will obviate searching in more than two alphabets. Some cataloging maintenance, he suggested, is best correlated with republication of the catalog: heavy withdrawals, transfers, and significant changes in headings --so that substantial changes do not have too long to wait before being reflected in the most recent republication of the master alphabet catalog. As for withdrawals, he suggested that titles not be just dropped,but that they be allowed to "migrate" to the supplementary file with a note of impending withdrawal for patron information. The system chosen should allow for this. Knapp warned that many systems do not have well thought out mechanisms for dealing with these problems.

COM the Way to Go: Finally, Knapp asserted that *"the cost differential between printed catalogs and COM is so significant that, given today's technology, one would have to have compelling reasons for going into print. At this point, the COM catalog is the best."*

REPORT FROM THE FUTURE: CAROL WEISS ON THE TORONTO SYSTEM: The University of Toronto has an online cataloging system and catalogs in both microfilm and fiche, on which library holdings can be queried by title, author, and subject. Carol Weiss's report of the UT state of affairs is enthusiastic and optimistic, with only one significant problem area: the new system has increased demand far beyond that created by the card catalog. If anything, user response is "too positive," said Weiss. In an experiment with even more advanced hardware, users also liked CRT terminals, and would stand in line to use them rather than consult the printed catalog. Neither fiche or roll film bothers them--with the exception of persons who have vision problems. The rest of her report touched on a lot of specific points:

Orientation to the System: Staff and users were both the object of major efforts to create confidence in the new system and to present the new catalogs as something added rather than to focus on the closing of the old catalog. Two teams worked on this, with a readers service staff developing a comprehensive training program for users.

Closing the Catalog: Toronto locked it up July 17, 1976 and the new micro catalog already has some 1.3 million records. The main catalog is still open for new serials and non-Roman alphabet acquisitions. The catalog is now cumulated annually with bi-monthly cumulating supplements. The separation of author and title files has been helpful and confuses no one. The catalog includes all titles, including general ones and series titles--a distinct aid to reference staff. And the filing is alphabetical as in the phone book--Mc's and Mac's are separated and umlauts are ignored. The result of these and other changes is that the user no longer needs to learn cataloging rules to find a book. And "main entry" is something only librarians need to understand.

The Hardware: Toronto has about 60 microfilm readers and a similar number of fiche readers (600 fiche= one catalog; five 700' rolls=one catalog). Titles are all on one ROM III reader, authors on another, and subjects take the capacity of two roll film readers. From the first day, most readers preferred viewing a microform screen to looking at a catalog card. Moreover, staff attempts to explain the microcatalog were considered unnecessary by most users, who find microforms easy to understand and to use--possibly one benefit of growing up in the TV generation. But they complain that there are not enough micro readers in the stacks--even though they never had the convenience of a card catalog in the stacks. And this fascinating bit, observed during an earlier experiment with CRT terminals, but not yet verified in use of the microcatalog: *"We found that people tend to ask questions differently of machines--different from the way they ask people."* People tended to make their questions general when approaching a reference librarian--but very specific (sometimes much too specific) when dealing with the machine.

Problems: The staff is more aware than users of one problem: until there are a lot more titles in the database, there will be more places where one has to hunt for a title. The removal of cards from the catalog caused some trauma, not only in users who objected to not finding cards they knew had been there--but also in faculty members who are dismayed to have the cards for books they have authored disappear. Then there is the lack of cross references--although this is offset to some extent by the increase in entries. One physical problem: getting enough high quality film for the long (700') film runs. This unexpected problem may force Toronto to go to the shorter reels. But there has been no loss or theft of fiche, and no serious fiche reader breakdowns, although film readers have needed considerably more maintenance--especially those not close to supervision by library personnel. For the first ten months, there was an average of 5.7 service calls per machine, with two library technicians spending about half their time on maintenance and repair. A trained maintenance staff, noted Ms. Weiss, is crucial.

ISBD PUNCTUATION/ALTERNATIVE SOLUTIONS: In response to a question about patron objections to ISBD punctuation (traditionalists in particular have argued that it would confuse people), Rosenthal said that Berkeley is using ISBD punctuation and no one notices. The only people who do are the card editors....And on whether decentralization of the "large heterogeneous collections" that Rosenthal gave as a main reason for dumping the card catalog, and whether something in between the card catalog and the online system might be practical for some libraries, Rosenthal responded that *"Even though I made a fervent plea for getting out of the card catalog business, there is a large range of media for bibliographic display which we didn't have the time to get into. Card catalogs will continue to be one means of display. And as far as input to bibliographic data files, there are many layers of agencies that contribute to bibliographic information. And we are now talking about the exchange of information on an international level, with the US, Australia, Great Britain and Canada talking about a consistent use of AACR (Anglo American Cataloging Rules). But even large academic and public libraries may have local collections which don't now receive central catalog treatment and maybe there are some categories of materials which shouldn't; they can be too local or too ephemeral."* Tom Mott, Dean of the Rutgers library school, added this perspective: *"The pace of automation is so fast, and the range of hardware so great that the choices of bibliographic control won't be between automation and manual systems--it will be within the range of options offered by computer technology."* He pointed out that not even the smallest business uses ledgers for accounting any more--there are too many easy electronic ways of doing the job.

AND BACK TO OKLAHOMA: Bob Clark said after the meeting that he had indeed got what he came for and added this: *"Basically I see the importance of conversion*

AND BACK TO OKLAHOMA (Cont'd): *to us as one of the best possible ways to open up new avenues of cooperation. The hard data provided made it clear that the states of the art is still in flux, and it will be up to us to make the best possible choices to provide the library user with the best possible access to information."* Clark also suggested that although N.Y.'s METRO is going to have a re-run sometime in February, some of the regional agencies in other parts of the country take it on themselves to present similar programs for their areas. ■

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Requests to attend the "Closing the Catalog" seminar surged into the METRO office. To help meet the requests for reservations METRO repeated the program two more times.

BIBLIOGRAPHY OF RECENT JOURNAL ARTICLES AND MONGRAPHS ON THE CURRENT STATUS AND FUTURE OF LIBRARY CATALOGS

Compiled by James D. Anderson for the METRO Symposium on Closing the Catalog: Automated Alternatives to the Card

September 1977

INTRODUCTION

The works in this list were located through Library Literature, recommendations from colleagues, references in other works, and announcements in professional journals. This is certainly not an exhausitive list. No attempt has been made to include the voluminous literature on book catalogs which has appeared during the last decade. Works preceded by an asterisk (*) were not seen or reviewed. The citation style is taken from the abbreviated version of the American National Standard for Bibliographic References, ANSI Z39.29-1977 (Mount, Ellis. A national standard for bibliographic references. Journal of the American Society for Information Science. 28(1): 3-12; 1977 January). If this is going to be a standard style, then we might as well start getting used to it.

PART I: BACKGROUND

(1) The future of card catalogs: report of a program sponsored by the Association of Research Libraries, January 18, 1975. Washington: Association of Research Libraries; 1975. 67 p.

Focuses on problems of enormous catalogs formed over many decades in accordance with several different codes. Such problems include: size, deteriorating cards, filing errors and inconsistencies, conflicts in headings and references, obsolete and missing references, missing cards, superseded cards not removed, and the increasing cost of maintaining and continuing these catalogs. Representatives of the Library of Congress and other research libraries discuss the background and source of these problems, current conditions and possible solutions. Emphasis is placed on possible relationships between old and new catalogs, with little attention given to the technology of catalog formats (e.g. COM, book, or on-line catalogs), although on-line catalogs are seen as contributing to an eventual solution to present problems.

(2) Daniels Ganning, Mary Kay. The catalog: its nature and prospects. Journal of Library Automation. 9(1): 48-66, 1976 March.

A summary of papers delivered at a symposium held Oct. 9-10, 1975 and sponsored by the Information Science and Automation Division, the Reference and Adult Services Division and the Cataloging and Classification Section of the Resources and Technical Services Division of ALA.

Theoretical and policy questions are emphasized, rather than details of new technology and catalog formats. Now familiar controversies are raised, such as the role of "main entry" in automated catalogs (Seymour Lubetzky), simpler description, preferably without ISBD punctuation, for non-research libraries (Joan Marshall, Marvin Scilken, Hugh Atkinson), inadequate subject access (Marshall), the need for authority control in order to gather bibliographically related works together (pro: Lubetzky, Michael Malinconico, William J. Welsh; con: Fred Kilgour, Hugh Atkinson).

The full proceedings of this valuable symposium were promised, but have not yet appeared. In the meantime, this summary is an excellent review of current opinion relating to library catalogs in this era of transition. Shorter summaries are provided by Maurice Freedman and John James (see entries below), and an abridged version of Michael Malinconico's paper appeared in Wilson Library Bulletin (see next entry).

(3) *Malinconico, S. Michael. Library catalog in a computerized environment [abridged from a paper delivered at an institute on The catalog --its nature and prospects]. Wilson Library Bulletin. 51(1): 53-64; 1976 September. Comment by A. D. Hogan, with rejoinder. Wilson Library Bulletin. 51(9): 724-725; 1977 May.

(4) James, John. Conference on the catalog held. Library of Congress Information Bulletin. 35: 149-152; 1976 March 5.

A briefer summary of the same conference described by Daniels Ganning. See entry under her name.

(5) Freedman, Maurice J. The catalog: its nature and prospects. Library Journal. 101(4): 594-595; 1976 February 15.

Another brief summary of the same symposium described in more detail by Daniels Ganning. See entry under her name.

(6) Rather, John C. The future of catalog control in the Library of Congress. Journal of Academic Librarianship. 1(2): 4-7; 1975 May.

This paper is also included as Appendix B in The Future of card catalogs (Washington: Association of Research Libraries; 1975). See entry (1).

Excellent discussion of the automated cataloging system which LC plans to implement by 1980. After describing its advantages, attention is shifted to the disposition of the present card catalogs. Rather advocates complete disassociation between new and old catalogs ("cutting the Gordian knot") and considering the MARC data base to be complete in itself for cataloging purposes, so that

new name, title and subject headings would not have to be compared or connected to those in the old card catalogs. A good review of the problems facing libraries with enormous retrospective catalogs.

(7) McElderry, Stanley. Alternatives to the conventional card catalog from the user point of view. IFLA Journal. 2(4): 232-236; 1976.

A paper presented by the University Librarian, University of Chicago to an IFLA gathering. Reviews the transition from sheaf or book catalogs to card catalogs, back to book catalogs, and now to computer produced book, microform and on-line catalogs. Points out that "the primary motivation for changes in the format of the catalog has been product oriented more than it has been consumer or user oriented" -- (p. 234-235), and that little study of user response to new catalog formats and access methods has yet taken place.

(8) *Clinic on Library Data Processing Applications, 1976. Economics of library automation. Edited by J. L. DeVilbiss. Urbana: University of Illinois, Graduate School of Library Science; 1977.

Includes "Economics of data conversion" by Michael Gorman, "Economics of book catalog production" by Maurice J. Freedman, and "Economics of output media" by S. Michael Malinconico.

(9) *University of California, Berkeley. Study Group of the Committee on Bibliographic Control. Future of the general library catalogs of the University of California at Berkeley: report--phase 3. Berkeley: University of California General Library; 1977.

The Study Group "proposes a plan of action for providing public and staff access to a unified bibliographic data base, built in machine-readable format and using the BALLOTS system, phased in over an eleven-year period. The primary means of access to data for both public and staff proposed is on-line, combined with computer output microform auxiliary lists, such as back-up data. The plan proposes closing the present card catalogs and the conversion of retrospective bibliographic data. Information on costs of the system and the necessary equipment, as well as projected cost savings and benefits, is provided.

"Copies of the report are available to individuals and to other libraries at a cost of $3 per copy. Requests should be addressed to: The Librarian's Office, University of California General Library, Berkeley, CA 94720. Prepayment is requested; checks should be made payable to the Regents of the University of California" -- (College and Research Libraries News. (5): 152-153; 1977 May).

(10) Cramer, S. A. The computerised catalogue in a university library. Libri. 26(1): 38-53; 1976 March.

Reviews the purpose and current status of, and the impact of automation on, catalogs, bibliographic description, subject analysis, accession numbers, the physical format of catalogs, and costs from a British perspective. Comments on user surveys, access to computer facilities and the MARC project as they influence automation of both current and retrospective catalogs in British libraries. An appended list of 66 references concludes with a 1969 work by J. L. Dolby, V. J. Forsyth and H. L. Resnikoff, who are quoted as saying that "the mechanization of the cataloging function is not only necessary and desirable, but also inevitable"--(Computerized library catalogs: their growth, cost and utility. Cambridge, Mass.: M.I.T. Press; 1969: p. 16).

(11) Elrod, J. McRee. Is the card catalogue's unquestioned sway in North America ending? Journal of Academic Librarianship. 2(1): 4-8; 1976 March.

After reviewing problems created by large card catalogs (size, inconsistencies, physical condition, demands on staff time, boring and repetitive operations, revision of headings), the author describes possible solutions, opting for a computer-based COM catalog. Reports the work of a task force assigned to design a COM catalog for the University of British Columbia and its proposals. Summarizes many of the findings and conclusions reported in the Association of Research Libraries symposium on "The future of card catalogs" (see entry (1), especially those presented by Library of Congress representatives).

PART II: NEW TECHNOLOGY--NEW SOLUTIONS

(12) Freedman, Maurice J. Automated network catalog products and services. Journal of Library Automation. 9(2): 145-155; 1976 June.

Based on a speech given at the institute on "Networks and networking; or how to automate without doing it yourself," New Orleans, February 1975, sponsored by the Information Science and Automation Division of ALA. Discusses the advantages and disadvantages of on-line cathode-ray-tube (CRT) display, the line-printer produced catalog card, the photocomposed book catalog or catalog card, and the computer-based microform catalog, and describes examples of actual applications in libraries. A good review of the current alternatives.

(13) Freedman, Maurice J. The automation of cataloging--1976. Library Trends. 25(3): 703-721; 1977 January.

Reviews recent activities contributing to the automation of cataloging. Makes a sharp distinction between "automated catalog support systems" such as OCLC, which produce entries for catalogs but perform none of the integrative functions necessary to convert a simple file of unconnected entries into a catalog and, on the other hand, automated bibliographic control systems which do tie together works by the same author, versions of the same work, and works on the same topic. Describes recent advances in bibliographic control systems which can insure uniformity of, as well as easily update, entry headings (names, uniform titles and subject or form headings). Concludes with a review of currently available automated catalog products, such as catalog cards, COM catalogs and book catalogs. A good discussion of the state of catalog automation as of 1976.

(14) Malinconico, S. Michael. The display medium and the price of the message. Library Journal. 101(18): 2144-2149; 1976 October 15.

A thorough review of the characteristics of COM and its advantages as the "display medium" for bibliographic files maintained in machine-readable form. Emphasizes the relatively low cost of COM, which permits libraries to create frequently recumulating, "self-refreshing catalogs" free of past practices, errors and inconsistencies. Recommended for all COM novices.

(15) COM applications in libraries: papers given at a seminar on the use of computer output onto microform by libraries, held by the Microfilm Association of Great Britain, University of Aston, Birmingham, 4th July 1973. Chairman: B. J. S. Williams. Edited by William D. Linton. Guildford: Microfilm Association of Great Britain; 1974. 41 p.

Papers include a general description of COM and reports of specific applications in British libraries for displaying catalog information. Brief discussions follow each paper, and the proceedings conclude with a general wrap-up session. A good introduction, in spite of occasional parochialisms.

(16) Spencer, John R. An appraisal of computer output microfilm for library catalogues: the final report on the findings and work of an investigation from December 1971 to July 1973, grant aided by the Office for Scientific and Technical Information and directed by B. J. S. Williams. Hatfield, Eng.: National Reprographic Centre for Documentation, the Hatfield Polytechnic; 1974. 108p.

A detailed, technical review of COM as a medium for library catalogs, including case studies of COM catalogs in five British libraries. Includes a glossary and an extensive bibliography.

(17) *Diaz, Albert, ed. Microforms and library catalogs: a reader. Weston, Conn.: Microform Review; 1977. ISBN 0-913672-16-5 $17.50.

Announced in Microform Review, 1977 January, p. 62.

(18) *National Micrographics Association. COM and its applications. Silver Spring, MD.: National Micrographics Association; 1977. 192 p. $4.50 for NMA members, $6 for non-members.

"This 192-page compendium of thirty-two articles about COM represents the most outstanding COM articles that have appeared in NMA's Journal of Micrographics over the last three years"--(College and Research Libraries News. (4): 108; 1977 April).

PART III: IMPLEMENTATION

(19) Bierman, Kenneth John. Automated alternatives to card catalogs: the current state of planning and implementation. Journal of Library Automation. 8(4): 277-298; 1975 December.

Based on an extensive survey of libraries actively engaged in planning for and/or implementing new, computer-based cataloging systems. Discusses reasons libraries are interested in converting their catalogs and describes specific examples of operational computer-based catalogs and alternative approaches. Concludes with five predictions, a long list of references, and a list of libraries surveyed. A good overview of the situation in North America as of 1974. A brief summary of this report appeared in Catholic Library World (47: 74-75; 1975 September).

(20) Meyer, Richard W.; Knapp, John F. COM catalog based on OCLC records. Journal of Library Automation. 8(4): 312-321; 1975 December.

Describes a functioning microfiche catalog at the Univeristy of Texas at Dallas. Most cataloging data is input via OCLC and then sent to Blackwell North America for merging into the library's catalog data base. Authority control over subject headings is provided, but control for author and title headings is not discussed. The catalog is output in four sections (author, title, subject and shelf-list) in an annual cumulation plus cumulating bi-weekly supplements, so that only 2 files must be checked for any search. A good description of how one library does it.

(21) Green, Robert H. Microform library catalogs and the LENDS microfiche catalog. Microform Review. 4(1): 30-34; 1974 January.

After a quick review of book and traditional microform catalogs (i.e. photographed from cards), describes the advantages of a computer-based COM catalog. Reports results of a study of user response to the LENDS microfiche catalog of Georgia Tech. Beware of a printer's error on p. 32, where several paragraphs are out of order!

(22) LeCroissett, Jill C. Microfilm catalogs in a British public library system. Microform Review. 4(2): 104-107; 1975 April.

Describes implementation, current status and user response to a COM catalog in microfilm cassettes in a large public library system of many branches. Suggests that "for libraries in the United States that are faced with the problems of preparing and distributing lists of holdings or multicopy catalogs, there seem to be many advantages in the kind of microform catalogs now in use in British libraries"--p. 106.

(23) *Fischer, Mary L. The use of COM at Los Angeles Public Library. Journal of Micrographics. 6(5): 205-210; 1975 May.

(24) *More libraries switch to COM catalogs. Library Journal. 102(6): 672-673; 1977 March 15.

american libraries

The Source

ACADEMIA

When Should a Library Enter "Analysis"? Perhaps Dr. MRAP Can Help

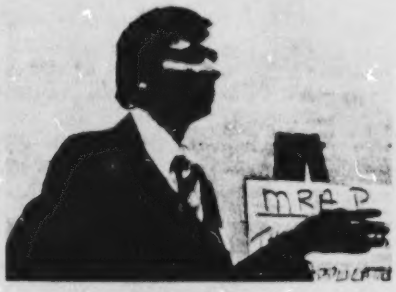
On the streets below, the St. Paddy's Day revelers were going nuts, and upstairs at the City College Graduate Center, "Dr. MRAP" was talking institutional analysis to a few dozen librarians from the New York metropolitan area. Like any good analyst, he told prospective patients that his method "would *reveal* problems, but not automatically resolve them."

Dr. MRAP is a 36-year-old librarian named Duane Webster who heads the office of University Library Management Studies (OMS) of the Association of Research Libraries in Washington. It is a small office, but its Management Review and Analysis Program (MRAP) is very well known to the thousand-plus staff members who have "done" MRAP in some 25 big libraries. Others may be superficially aware of the MRAP program through the literature;* but only those whose libraries have actually undergone the onerous, agonizing, and brutally open analysis have earned the Ancient Mariner's look of "having lived to tell the tale."

Two such narrators are John P. McDonald and Norman Stevens of the University of Connecticut in Storrs. Neither is ancient, nor has their hair turned white from the MRAP experience; but as managerial mariners seeking a better navigational tool, they tried MRAP, lived through it, and were in New York to share with others what they had learned.

Webster Gives Background

McDonald and Stevens followed a presentation by Webster at the all-day seminar, "A New Tool for Managing Libraries; the MRAP Process for Change," moderated by Larry Earl Bone of Mercy College and sponsored by the New York Metropolitan Reference and Research Library Agency (METRO) in cooperation with the Special Libraries Association's New York Chapter, the Long Island Resources Council, and the Southeastern Library Resources Council.



Duane Webster

Webster reviewed the elements of the program, which has gone through five phases since it emerged from ARL's Management Office in 1971. It is basically an "assisted self-study" program for large libraries, particularly academic libraries attached to larger institutions. Using the techniques, tools (400-page manual), and guidance provided by OMS, study teams and task forces representing all staffing levels conduct an intensive analysis of management structure. They study and articulate how things have been done, what goes on today, and what changes ought to be made. They examine goals and objectives, strengths and weaknesses. And finally, with the continuous involvement of the director, a report emerges.

The report is a descriptive one—it is a consensus of what's been going on, spotlighting strengths to build upon. But it is also prescriptive. its aim is to produce feasible, affordable, easily implemented ideas to bring about improvement. It is invariably a step toward greater staff involvement.

"Overall," says Webster, "the plan, the orientation, is to put together a strategy for changing attitudes, values, and behavior of library organizations." He stresses that MRAP is an education as well as a strategy for change. The analysis process "educates the parts of the fragmented [management] pyramid in the nature of the whole." Just documenting the budget process is an education in itself, he notes.

Twenty-four institutions have, according to MRAP requirement, assembled the documents of their studies. Ranging from 71 pages (Iowa State) to 384 (Toronto), they may be valuable to others as case studies, but not, Webster warns, as blueprints for one's own MRAP. Some of the reports are available from the Office of Management Studies, 1527 New Hampshire Ave., N.W., Washington, DC 20036, at $15-20. The rest may be requested directly from the institutions. A full listing from the Office of Management Studies tells which is which.

Captains Courageous

McDonald and Stevens form an unusual management team at U. Conn./Storrs; they are director of university libraries and university librarian, respectively. They were also among the first administrators to take on the MRAP process, and it required no little courage.

"We knew there would be trauma," said McDonald. "Any change is going to hurt someone. But we did it, and today we're glad. . . . I'd been there [as a top administrator] ten years; one does get set in one's ways. Now, after 15 years, having been through MRAP helps me to resist that tendency; it gives me some perspective. The process educated us to many strengths, surprises, realizations."

One of those realizations, said McDonald, who headed ARL during a leave of absence in 1975-76, was that "if I ever had any power I don't anymore."

*A bibliography compiled by Augurio Collantes of Medgar Evers College Library, Brooklyn, N.Y., cites 18 substantial writings on MRAP. Among them is an excellent 10-page symposium in the Jan. 1976 *Journal of Academic Librarianship*.

Webster reported that in many large academic libraries "the role of the director as the agent of change is giving way to the participation of staff who are directly involved in the areas affected by change."

McDonald pointed out, however, that some of the MRAP participants developed unrealistic expectations as to how fast changes could occur once implementation of MRAP recommendations was begun. They expected sudden change, not a 3- to 5-year shift into new directions. As a result, there are some negative feelings as an after-effect of MRAP as well as positive ones.

Stevens, in looking back four years on the MRAP experience, had some pros and cons for the METRO audience. The analysis, he said, had yielded a greater adaptability to such changes as moving into a new building; "helped us to arrive at means of effective operations; and, for those who actively participated, increased the general ability to grow and develop." But with hindsight he observes that the time involved was greater than anticipated; "we shouldn't have spent so much time on policy"; and "we could have benefited from more interchange with other institutions undergoing MRAP."

The present U. Conn. staff doesn't talk about MRAP anymore; its recommendations—some adapted, some thrown out—are an integral part of staff life.

"Some folks long for the flexibility they once had," notes Stevens, "but they understand and accept that sacrifice." On the other hand, "we haven't easily accommodated full staff participation. The department heads still want some control."

Who Needs Dr. MRAP?

Nothing in the MRAP technique limits it specifically to libraries, but it is the only management self-analysis package that has been tested at such length by so many major library institutions. Further, not one of the 24 libraries which began MRAP abandoned it before the final report was completed.

"I could name a few institutions that were disappointed," Webster told *AL* during a lunch break at the Algonquin, "but," he grinned, "I wouldn't do so for a journalist."

Because the MRAP process usually requires nine or ten task forces of about five staff each, it is best suited to the large library, such as those belonging to ARL. Members pay only the actual expenses of Webster and staff in administering MRAP; non-member libraries must compensate ARL for the staff time—still cheaper than the $400 per day charged by private management consultants of comparable expertise.

Webster's Office for Management Studies, nurtured and developed through grants from the Council on Library Resources, could handle perhaps ten to fifteen MRAP studies a year if it had to; but the office has several other projects. It has put together an Academic Library Development Program—again sponsored by CLR—for libraries as small as 12 staff members. An offshoot of MRAP, the ALDP studies a library's technology along with its management. Webster hopes to make it available to all libraries.

As for MRAP's applicability, Webster feels that just about any large academic library could benefit from it, and now smaller libraries, too, are taking part in a modified MRAP process. But he, McDonald, and Stevens agree, "you're better off going into MRAP if you *don't* have major problems."

Says McDonald: "It would be like having a baby to cure a bad marriage."

And Stevens adds, emphatically: "If you're about to be fired, MRAP is not going to save your job." —*Art Plotnik*

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ASSOCIATION OF RESEARCH LIBRARIES

OFFICE OF UNIVERSITY LIBRARY MANAGEMENT STUDIES

STATUS OF INDIVIDUAL MANAGEMENT REVIEW AND ANALYSIS PROGRAM STUDIES

PARTICIPANT	TITLE	STATUS	AVAILABILITY
MRAP ONE			
Iowa State University	*A Review of the Management Practices of Iowa State University Library.* August 1973. 71 pp.	Initial implementation completed. Implementation of long-range recommendations underway.	From Warren Kuhn, Director, Iowa State
Purdue University	*A Management Review and Analysis of Purdue University Libraries and Audio Visual Center.* 1973. 202 pp.	Initial implementation completed. Implementation of long-range recommendations underway.	From OMS -- $15.00
University of Tennessee	*Evaluation of the University of Tennessee/Knoxville Library.* May 1973. 101 pp.	Initial implementation completed. Implementation of long-range recommendations underway.	From OMS -- $15.00
MRAP TWO			
Boston University	*Management Review and Analysis. Boston University Libraries.* 1974. 165 pp.	Initial implementation completed. Implementation of long-range recommendations underway.	From OMS -- $15.00
University of Connecticut	*Report of the Management Review and Analysis Program.* 1975. 95 pp.	Initial implementation completed. Implementation of long-range recommendations underway.	From OMS -- $15.00
Case Western Reserve University	*A Management Review and Analysis of the Case Western Reserve University Libraries.* April 1974. 132 pp.	Initial implementation completed. Implementation of long-range recommendations underway.	From James Jones, Director, CWRU.
Rutgers University	*Final Report of the Management Review and Analysis Program Study Team.* Rutgers University Library. 1974. 190 pp.	Initial implementation completed. Implementation of long-range recommendations underway.	From OMS -- $15.00

PARTICIPANT	TITLE	STATUS	AVAILABILITY
MRAP TWO cont'd			
Smithsonian Institution	*Management Review and Analysis of the Smithsonian Institution Libraries.* January 1974. 143 pp.	Initial implementation completed. Implementation of long-range recommendations underway.	From OMS -- $15.00
University of Washington	*Report of the Management Study of the University of Washington Libraries.* November 1973. 174 pp.	Initial implementation completed. Implementation of long-range recommendations underway.	From OMS -- $15.00
MRAP THREE			
Library of Congress (DBPH)	*Management Review and Analysis of the Division of the Blind and Physically Handicapped/Library of Congress.* 1974.	Initial implementation completed. Implementation of long-range recommendations underway.	From F. Kurt Cylke, Library of Congress
University of Missouri	*Report of the Management Review and Analysis of the University of Missouri/ Columbia Libraries,* 1974. 151 pp.	Initial implementation completed. Implementation of long-range recommendations underway.	From Dwight Tuckwood, Director, U. of Mo./ Columbia Libraries.
University of Maryland	*The Management Review and Analysis Program Report to the Director of Libraries.* University of Maryland Libraries. September 1974. 258 pp.	Initial implementation completed. Implementation of long-range recommendations underway.	From OMS -- $15.00
University of Rochester	*The Final Report of the MRAP Study at the University of Rochester Library.* 325 pp.	Initial implementation completed. Implementation of long-range recommendations underway.	From OMS -- $20.00
Washington State University	*The Washington State University Library Management Report.* December 1974. 127 pp.	Initial implementation completed. Implementation of long-range recommendations underway.	From OMS -- $15.00
MRAP FOUR			
UCLA	*Management Review and Analysis Program/ UCLA Library, 1974-77.* February 1977. 138 pp.	Currently being implemented.	From OMS -- $15.00
Indiana University	*Management Review and Analysis Program, Indiana University Libraries.* January 1976. 122 pp.	Currently being implemented.	From OMS -- $15.00

PARTICIPANT	TITLE	STATUS	AVAILABILITY
MRAP FOUR cont'd			
University of Kentucky	*Report of the Management Review and Analysis of the University of Kentucky Libraries.* June 1976. 259 pp.	Currently being implemented.	From OMS -- $15.00
University of Massachusetts	*A Management Review and Analysis of the U. of Mass. at Amherst Libraries.* July 1976	Currently being implemented.	From OMS -- $15.00
Pennsylvania State University	*Management Review and Analysis Program at the Pennsylvania State University Libraries.* September 1975. 264 pp.	Currently being implemented.	From OMS -- $15.00
University of Toronto	*Report of the Management Review and Analysis Program at the University of Toronto Library.* June 1976. 384 pp.	Currently being implemented.	From OMS -- $15.00
University of Utah	*University of Utah Library Management Review and Analysis Program, final report.* November 1975. 207 pp.	Currently being implemented.	From OMS -- $15.00
Johns Hopkins University	*The Milton S. Eisenhower Library MRAP Report.* September 1976. 131 pp.	Currently being implemented.	From OMS -- $15.00
MRAP FIVE			
University of Oklahoma	Chairperson: Jan Seifert	Study scheduled for completion Summer of 1978.	

ORDERING INFORMATION

Reports listed as available from OMS may be ordered by sending a check for the purchase price made payable to "Association of Research Libraries/OMS" to: Office of Management Studies, Association of Research Libraries, 1527 New Hampshire Avenue, N. W. Washington, D. C. 20036.

Readings on MRAP (Management Review and Analysis Program) and Related Management Studies

Compiled by Augurio Collantes
Coordinator, Cataloging and Processing
Medgar Evers College Library
Brooklyn, New York

Association of Research Libraries. Office of University Library Management Studies. Sixth Annual Report, December 1976. p. 9-10, 17.

Bailey, Martha J., Michael K. Buckland and Joseph M. Dagnese, "Influencing Change: The Role of the Professional," Special Libraries (April 1975) 66:183-87.

Booz, Allen, and Hamilton, Inc. Organization and Staffing of the Columbia University Libraries: A Case Study. Westport, Conn., Redgrave Information Resources Corp., 1973. 210p.

"Effecting Change in the Management of Libraries: The Management Review and Analysis Program," in Association of Research Libraries, Minutes of the 82d Meeting, New Orleans, La. Washington, D.C., Association of Research Libraries, 1973. p. 41-80.

Contains reports by Duane Webster and the directors and chairmen of the first three libraries to undertake MRAP studies: Iowa State University Library, Purdue University Library, and the University of Tennessee at Knoxville Libraries.

"Is MRAP in Your Future?" Journal of Academic Librarianship (January 1976). p. 3. /editorial/

"The Management Review and Analysis Program," a symposium, ed. by Michael K. Buckland. Journal of Academic Librarianship (January 1976). p. 4-14.

Discusses these topics: development and use of MRAP; when conditions are suitable for MRAP and when they are not; the choice of MRAP as a vehicle for change; MRAP and the library director; the impact of MRAP on the library staff; and scaling down MRAP for smaller libraries.

"Management Review and Analysis Program (MRAP) Begins," Mt. Plains Library Association Q. (Winter 1974) 19:21-22. /news and events/

"Management Review and Analysis Program," in American Society for Information Science (ASIS), Annual Review of Information Science and Technology. Washington, D.C., ASIS, 1974. v. 9, p. 338-339.

"MRAP (Management Review and Analysis Program): The University of Tennessee Knoxville Experience," Southeastern Librarian (Fall 1974) 24:22-40.

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Describes the overall program touching on the various phases involved, the plan of action, and the implications for the library. Some guidelines have to be adjusted to the requirements of a particular library.

_____, "Management Review and Analysis Program and Its Significance," Southeastern Librarian (Fall 1974) 24:22-24.

_____, assisted by Suzanne Frankie, Library Management Review and Analysis Program: A Handbook for Guiding Change and Improvement in Research Library Management. Washington, D.C., Office of University Library Management Studies, Association of Research Libraries, 1973. /available to participants only/

_____ and Jeffrey Gardner, "Strategies for Improving the Performance of Academic Libraries," Journal of Academic Librarianship (May 1975) 2:13-18.

_____ _____, "A Structure for Implementation of Study Recommendations," Washington, D.C., Association of Research Libraries, Office of University Library Management Studies, August 1975.

Since the seminar METRO and MRAP have been exploring possible adaptations and use of the process in METRO libraries. The Council on Library Resources, Inc. has made a major grant to the Association of Research Libraries to help a large number of academic libraries in two and four year colleges conduct self study programs.

MEDICAL INFORMATION TABOOS

Many of the basic reference courses in our library schools still teach that fields like law and medicine are super-sensitive, and that any public information service in these fields ought to be handled with extreme caution. We who are librarians have tended, traditionally, to be so cautious that the average citizen is rarely able to get any useful legal or medical information from us.

Those taboos still exist, but there are heartening signs of change. An interesting experiment in medical-public library cooperation is the Community Health Information Network (CHIN) in Massachusetts. Ellen Gartenfeld, CHIN coordinator, says: "As long as librarians don't pretend to be doctors, there's really no problem for them. We're not providing 'do-it-yourself' medicine; we're supporting people in their interaction with their health professionals. The time has come for librarians to develop these skills and provide this service. If we don't someone else will, and we'll have allowed another of our responsibilities to go to some other kind of new 'information professional.' "

Ellen Gartenfeld is right! CHIN, and projects like it, are major steps forward in an information service area where taboos have reigned for much too long.

— JOHN BERRY,
editorial in
Library Journal

MED-INFO: For the Reference Librarian
Who is Not a Medical Librarian

by Alice Norton, Alice Norton Public Relations

The first seminar speaker, John Berry, presented a well-researched, provocative rationale for supplying medical information in libraries of all types. To support his view that the label "profession" is generally not a useful one, Berry said some believe people may be professionals, but occupations are not professions.

Berry then traced the history of librarianship's "practical education" which, until recently, was "outside the main stream of higher education." In Berry's view the attempt by librarians to elevate their field to a science and a profession "didn't come off." Among the examples he cited to prove his point were: the appointments to top library posts of persons who are not librarians, minority pressure to hire graduates of nonaccredited library programs, and the emergence of information science which claims to be the home of much library science. His conclusion: "Librarianship is still not regarded as a true profession by the university or the majority of the public."

Librarians are fortunate, however, in Berry's view, that their field is not thought of as a profession, like medicine and law. As proof that regulation in these fields is not working, he referred to the glut of lawyers and the shortage of doctors. Berry said that the belief is growing that the professions provide "disabling help." People are seeking information so they can treat themselves. And it is because librarians are not yet considered professionals that they are trusted.

Berry said librarians should become "public information professionals." His recommendations:

*Gather the information people need.

*Seek adequate funds for library operations.

*Teach everyone how to use libraries. ("We should be helping people gain independence.")

"Let's use research and public relations," Berry urged, "to sell our program to others." He warned that otherwise citizens will refuse to support libraries, as they have withdrawn support from medicine, law, and education.

The second speaker, Nancy Calabretta, answered the question "Medical Books -- Which Ones and Why?" with authoritative, practical advice. Calabretta supplemented her talk with the 30-page annotated bibliography she had prepared for the seminar.

Calabretta commented on the increasing demand for medical information as the citizen becomes "less the docile patient, more the health care consumer." The speaker said that physicians often fail to take time to explain to patients the nature of their illnesses and patients frequently are reluctant to press for more information. The librarian should, Calabretta advised, "provide information, not interpret it." She recommended that librarians refer patients who ask for medical evaluations back to their physicians. "Remind them," the speaker said, "that you have had no more medical training than they have."

In selecting medical reference books Calabretta offered these guidelines:

*Use core lists, including the highly respected list which Alfred N. Brandon prepares biannually for the April issue of the Bulletin of the Medical Library Association (a copy of the 1977 list was in the seminar packet).

*Evaluate other materials by the usual criteria: publisher, author, reviews ("hard to locate"), and recommendation by a professional.

*Ask staff of a nearby large medical library for advice and for permission to examine materials.

*Expect to pay high prices because good texts are comprehensive and one will give more value than several, less expensive, "popular" publications.

*Concentrate on purchases of clinical medicine books. (Most answers to questions asked by health care consumers are found in these rather than in the basic medical books such as anatomy and biochemistry.)

Calabretta then used her bibliography as the basis for comments on materials to buy and a few to avoid.

Some highlights:

*One of the good medical dictionaries is essential.

*Medical handbooks are the second most important tools for a library.

*Directories are the sources for many factual questions, but because of their high costs librarians might attempt to get free, discarded one-year-old editions from other libraries or a group of libraries may purchase copies cooperatively.

*Medical encyclopedias are no longer useful because of the impossibility of keeping them up-to-date.

*In using handbooks on drugs, poisoning, and toxicology librarians should be cautious in interpreting information. ("Don't guess." "Refer your users back to their family doctors or, better yet, to their pharmacists.")

*Some basic authoritative nutrition handbooks are needed "to offset the overwhelming number of popular diet and nutrition books."

*Statistics handbooks cover communicable diseases; other statistics are hard to find and frequently several years old.

*In selecting textbooks librarians should analyze the types of questions they receive.

*Because the medical field changes rapidly, journals and their indexes are of great importance.

Following a detailed explanation of how to use Index Medicus, Calabretta commented on the free services offered by the Center for Medical Consumers and Health Care Information, 410 East 62nd Street, New York City. (Free access to the library, self-help workshops for reasonable fees, Tel-Med -- a phone library of taped information, and a consumer health bulletin.)

Participants revealed by their questions to both speakers that many of their libraries were offering medical information. Among the questions: How should we have responded to the young person who wanted information about a drug he might take? Should the

librarian censor information supplied to a child? How should we answer a psychiatric patient who wants information about his or her treatment? What about the terminally ill patient who phones to ask about his disease? Should the librarian be protected when he or she gives out medical information the community may not want supplied?

Patricia Hamilton told participants about "Free and Inexpensive Medical Sources." Hamilton is coordinator of an information center whose main users are health care agency staff who are starting to work in health education. (The center, however, supplies information to anyone who requests it.) The center's collection, which has only a few books and 40 journal subscriptions, consists mostly of miscellaneous materials Hamilton has gathered. Seminar packets included two bibliographies the speaker had prepared -- a list of catalogs, titles of lists of sources of health education materials, and a 12-page compilation, "Sources of Free or Low Cost Health Education Materials for Consumers." (Annotations give subjects of the material and tell whether the agency issues a catalog and whether material is in printed form and/or an audiovisual format.)

The speaker said that hundreds of organizations throughout the country produce health education materials (print and audiovisual) designed for the general public. The field lacks and badly needs, in Hamilton's view, one comprehensive, current catalog.

Free pamphlets, posters, and fliers are getting scarcer, for many of them small fees are charged, and some are "too general and noncommital" to be useful. ("Watch out," she said, "for those that end with the warning, If you have any questions, consult your physician. These are usually one-time-only publications." Also she said that people often don't feel free to consult the physician or do not have one.)

Among the sources of free or low cost materials in the list are: voluntary and non-profit agencies, professional associations and societies, insurance companies, pharmaceutical and other commercial sources, U.S. government agencies, and other producers of these materials. Hamilton also suggested that librarians consult state and local government agencies, such as health departments.

Hamilton closed with the reminder that "the field of medicine is limited." In many areas much information

is still unknown and specialists offer conflicting views. "We must make informed decisions for ourselves," she said, "so access to information is very important."

As the seminar's final speaker Lynn Kasner, coordinator of a regional library service at the New York Academy of Medicine, described some of the medical library resources in the New York City region. These should be called "health sciences libraries," Kasner said, because many of them support programs that include (in addition to medicine) nursing, pharmacy, physical and occupational therapy, medical technology, and other health professions. She said that although librarians of these collections may want to increase access, the material was chosen to support specialized, technical programs and is not easily understood.

The speaker said that the New York Academy of Medicine Library is "one of the most respected and distinguished medical research libraries in the world." Its resources include 450,000 bound volumes, 180,000 pamphlets, current subscriptions to more than 4,000 periodicals, a portrait collection, and a picture file. The reference staff of five gives service in person, by phone, and mail but only the 3,000 fellows of the Academy and others who pay a fee may borrow materials.

Because the Academy is open to the public, Kasner said that other medical libraries refer outside requests to this research library. "Many who come," Kasner commented, "would be better served by a public library."

"The best way for libraries to access the collection," the speaker advised, "is through library networks." The Academy is the backup library for medicine and psychology in the New York State Interlibrary Loan Network (NYSILL).

When the Academy is unable to fill a request, staff refer it to the Regional Medical Library. This is one of eleven regional libraries which the National Library of Medicine designated to disseminate the findings of federally funded medical research. Last year through interlibrary loan (its major activity) the regional library provided 26,000 medical loans. Through the regional library researcher personnel can, for a fee, search the National Library of Medicine computer data bases.

During the discussion after Kasner's speech, Ellen Gartenfeld, a Boston health information specialist, cautioned that before referring a person to the private Academy library a librarian should be sure the person knows how to use materials, such as Index Medicus. Another participant, a staff member from The New York Public Library, said the Mid-Manhattan Library's Science Department is also a valuable source of medical materials for the serious student.■

MED-INFO Lists Offer Selection Help

To order copies of the three bibliographies distributed during the seminar send a check for $5 made out to METRO ($10 if an invoice is required). They are:

"Medical Library Materials for Nonmedical Libraries," compiled by Nancy Calabretta (reference librarian, Scott Memorial Library, Thomas Jefferson University, Philadelphia). Included in the 30-page annotated guide are: selection aids, a selected list of medical publishers with addresses, recommended primary reference sources (dictionaries, handbooks, and textbooks), and sample pages from medical indexes and related tools. Librarians can build a reference file by ordering free single copies of items listed in the bibliography's 6½-page reprint of the Keyword Index to National Library of Medicine management sources (from abuse, child to water fluoridation).

"Sources of Free or Low Cost Health Education Materials for Consumers." This 12-page list of agencies, organizations, societies, and companies includes: the agency's name and address, the subject of the material offered, and symbols which indicate if the agency has a catalog and whether the information is in the form of print, audiovisual, or both.

"Available Catalogs of Listings of Sources for Health Education Materials." This 3-page annotated list helps the librarian identify the hundreds of organizations which produce health education materials for the general public. Patricia Hamilton, coordinator, Information Resource Center, Office of Consumer Health Education, College of Medicine and Dentistry of New Jersey, compiled the two consumer lists.

"It is important to understand that behavior is purposeful and that it is caused. People are not uncooperative just for the sake of being perverse. There are causes for such behavior. The successful leader is the one who can uncover these causes and take steps to correct them."

— PERSONNEL: THE MANAGEMENT OF PEOPLE AT WORK by Dale S. Beach (New York: Macmillan, 1975)

PROGRAM

8:30 Registration and coffee
The program will begin promptly at 9:00

Morning

PLANS FOR THE DAY

AN OVERVIEW OF WORK: MEANING, CONFLICTS, DILEMMAS (All participants will take part in some exercises.)

FILM — on the supervisor's role in working with the troubled worker

SPECIAL PROBLEMS — THAT SUPERVISORS FACE

- emotional problems
- alcoholism/drugs
- differing attitudes toward work
- "troublesome" workers and implications for supervisory response

11:30 - 1:00 p.m.

LUNCH (No group lunch will be arranged but each person will be given a list of nearby restaurants and a map.)

Afternoon

WORKSHOPS: Leaders will use case discussion, exercises, and role-play to enable participants to identify their concerns and develop strategies for solutions.
Note: Each of the 5 workshops will be given twice: first from 1:00 to 2:30 p.m., then again from 2:45 to 4:00 p.m. There will be a coffee break between the 2 sessions, from 2:30 to 2:45 p.m.

Topics
- Emotional Disorders
- Alcoholism/Drugs
- Work Patterns/Work Ethic
- Troublesome Workers
- Supervisory Skills

TRAINER

Susan Bellinger, *CSW — Training Director*
Industrial Social Welfare Center
Columbia University School of Social Work

WORKSHOP LEADERS

Mary Kuhn, *MSW — Trainer*
Mallory Pepper, *MSW - Research Associate*
Kathleen Schiaffino, *MSW — NIMH Intern*
Industrial Social Welfare Center
Columbia University School of Social Work

Paige Cook, *CSW — Director*
Adelphi University Answer Program

Lazaro Diaz, *MSW — Social Worker*
International Ladies' Garment Workers' Union

The Supervisor and the Troubled/Troublesome Employee

by Roger Parent, Staff Development Librarian,
Princeton University Library

Severe staff cutbacks or frozen staffing levels are creating problems for many libraries. As a result administrators can no longer indefinitely carry employees whose personal problems seriously affect their job performances. Today each employee must be productive and contribute fully to help achieve the library's goals.

To help librarians become more effective administrators, METRO sponsored a one-day seminar on "The Supervisor's Role in Working with the Troubled/Troublesome Employee." Julia Brody, The New York Public Library, chairperson of the seminar planning committee said in her introduction: "No longer can we afford to let the troubled employee blend into the background. Nor can we ignore personal problems which affect job performance, nor can we live with disruptive behavior caused by the troublesome employee."

This situation is not unusual; Brody said it touches most supervisors at some time. Yet few librarians have had training or guidance in working with the troubled or troublesome employee. The 82 librarians who attended the seminar were concerned about alcoholism, drug addiction, family crises, divorce, physical disabilities, and other personal problems of staff. The supervisors said these problems manifest themselves on the job in withdrawal, carelessness, deteriorating job performance, and chronic absenteeism.

Seminar participants said they were also concerned about employees who are dissatisfied with their jobs and who express their dissatisfaction through disruptive and troublesome behavior. The leader for the seminar was Susan Bellinger. (Bellinger had been co-director for METRO's previous successful seminar on "The Supervisor's Role in Working with the Troubled/Troublesome Employee.") Bellinger opened the program by asking the 82 participants to name

their concerns and recorded them on large sheets of newsprint. The discussion revealed the wide range of personal problems which affect job performance and also how commonly such problems occur within libraries. Frequently members of the group responded in chorus when someone cited a particularly common problem facing supervisors.

Bellinger then focused the seminar on the role and responsibility of the supervisor in dealing with these problems. She stated that there are no magic answers or easy solutions.

> The supervisor's responsibility is to get the job done and to be certain that each employee meets the requirements and expectations of the job. Supervisors are not in their positions to diagnose the employee's personal problems nor to serve as father, mother, or counselor to the employee.

Bellinger added that in working with the troubled employee whose job performance is deteriorating the supervisor should give the employee accurate and objective feedback which documents exactly how job performance is being affected. Broad generalizations should be avoided. The supervisor should, of course, show concern and empathy for the troubled employee, but should not attempt to diagnose the problem, question the employee about the nature of the problem, or attempt to counsel or solve the problem. If job performance has not been affected, it is not the supervisor's concern or responsibility.

Bellinger explained that the supervisor can be most supportive by giving timely feedback and by suggesting the employee seek professional help. The supervisor is not supportive when he or she tolerates poor job performance from a troubled employee for an extended period of time.

Participants learned that the supervisor's role and responsibility are different when the problem with the troublesome employee lies not in an external, personal problem but within the job itself. Bellinger asked participants to answer the question, "Why do people work?" "For most people" she stated, "work is at the core of life and has critical meaning." She explained that it is through work that we define ourselves.

Participants identified 15 reasons for working. Those named as being of major importance were: money,

satisfaction, social interaction, challenge, creativity, achievement, power and status. Bellinger explained that most of these combine into three primary reasons for working:

1) economic, the need for money to supply basic necessities

2) social, the need to feel a part of a group

3) psychological, the need to achieve status and fulfillment

When a person fails to have any one of these needs met a problem may arise.

She said, for some, particularly a person who didn't choose his or her occupation, or who is in a low-pay, low-status job, the potential for troublesome behavior is great. A job which doesn't fit the person who holds it causes frustration, boredom, and anger. Participants defined troublesome behavior as tardiness, absenteeism, the abuse of benefits, careless work, and disruptions in the workplace.

Although a supervisor is limited in what he or she can do to help each employee satisfy the three primary needs associated with work, the seminar participants offered the following suggestions:

*The supervisor can discuss the job with the employee and try to learn how that person feels about his or her work and whether it meets his or her expectations and needs.

*The supervisor can help satisfy basic social and psychological needs by readily giving praise, by showing respect for the employee's work, and by giving an overview of how the job fits into the total library operation.

*When a problem exists within the work itself, the supervisor can analyze the job and explore with the employee alternative ways of doing it. Or the supervisor can investigate additional training or supplementary assignments which would be more satisfying than the present ones.

*The supervisor can suggest these and other alternatives and allow the employee to choose the most suitable one. (What is satisfying to one person may not be satisfying to another.)

In addition to outlining for the employee any problems in job performance, Bellinger said that the supervisor is also responsible for making sure that the employee's performance improves. The supervisor must make sure that agreements which he or she makes with the employee are fulfilled within a specified time.

She said the supervisor can help the troubled employee by being aware of the support system available in the library and the community. In large organizations the support system may include in-house counseling and referral services. In all organizations, however, basic support is available through health and insurance plans and formal policies such as sick leaves or leaves of absence. These policies must be administered in an institutional climate which will not threaten the employee or prevent him or her from seeking help. Clearly stated policies and benefits can be used to provide assistance during periods of personal crisis.

Bellinger pointed out that many community services are available to provide the professional help which most libraries cannot offer. They include centers to deal with family crises, alcoholism, and drugs. Counseling is available to help individuals cope with legal questions, divorce, family illnesses, and death. The supervisor can become aware of these services by contacting the National Association for Mental Health or a local community council.

Many of the questions which participants asked Susan Bellinger at the end of the morning session concerned confidentiality and record keeping.

Bellinger and the participants agreed that the supervisor must be observant about each employee's work needs and maintain a written record or other documentation to substantiate a claim of poor job performance. Records must be specific, must cite specific examples of poor work and, most importantly, must be shared privately with the employee. The form in which these records are collected and written varies among institutions. It is each supervisor's responsibility to be thoroughly familiar with the library's policies for the maintenance of personal records.

During the afternoon session, each participant selected two of five small groups for informal discussions. Topics were: emotional disorders; alcoholism; troublesome workers; differing work patterns and work ethics;

and supervisory skills. With a trained social worker as leader for each group, participants talked about their own problems and concerns. They had the opportunity to interpret the approaches suggested during the morning session in terms of their own work environments and leadership styles.

During the discussions some librarians expressed dissatisfaction with the policies and practices of their libraries concerning the troubled employee. Some said they felt the need to make changes. The first step, they said, would be to review and clarify these policies and communicate them to all supervisors.

Other librarians commented on new insights they had gained into some of the causes for poor job performance. They said they felt ready to try to assess more carefully the feelings of their employees and to consider the possibility that a personal problem may affect the quality of an employee's work. As a result of the seminar they said they recognized the importance of meeting with the employee to discuss performance problems as soon as these problems manifested themselves even at the risk of seeming unfriendly or severe.

In evaluating the seminar some supervisors said they now understood more clearly their responsibility to the staff member and to the organization. Others commented that they felt they would be more comfortable in dealing with performance problems with employees. ■

Following the METRO seminar, Roger Parent arranged a similar program led by Susan Bellinger for some of the Princeton Library staff. Other library staff observed the process and Bellinger is now offering periodic seminars for supervisors at the library.